

Electronic Signature through DocuSign. Advisor Version



This document will outline the steps required to initiate the electronic signature process, provide screen shots, and includes what your client's experience will be.

An overview of each of the sections is described below:

Electronic Signature through DocuSign **Page 2**

- Provides an overview of the different options based on the types of actions

Initiating the Electronic Signature Process **Page 3**

- Describes the screens available to start the electronic Signature process

Your Remote Workflow **Page 4**

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Your Client's Remote Workflow **Page 5**

- Describes the steps your client will follow

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Your Client's In-Person Workflow **Page 11**

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- Provides answers to some of the frequently asked questions

Electronic Signature through DocuSign

SEI utilizes DocuSign to obtain electronic signatures for completing Advisor Desktop online actions and SEI Private Trust Company forms. When submitting your request through the Advisor Desktop's online actions, a (digital) form will be generated so that the client can electronically sign. This process can take place in-person or remotely.

Prior to accessing the document for electronic signature, your client will need to complete an authentication process. This authentication process is provided by DocuSign and follows either a Knowledge Based or Pin authentication process.

Knowledge Based Authentication: Distributions and Transfer actions and forms to move money outside of the account or outside of SEI have more stringent signature requirements. As such, the SEI process utilizes DocuSign's "knowledge-based" authentication method. Here the user answers a series of questions like affiliated address, relatives, old residences, etc. Please note, these questions are generated automatically by DocuSign using information from public records. Neither the advisor nor SEI can see or control the authentication questions.

Pin Authentication: Actions and Forms that are used to request changes within an account, such as trades or strategy (model) changes, use access code as the authentication method. Those codes are delivered to your client via phone or SMS based on the advisor's choice.

Document Expiration Time: Your client will need to complete the electronic signature process prior to an expiration time. If your client fails to electronically sign the document based on the expiration time listed below, the action will be cancelled, and the request will need to be resubmitted.

Remote

- Straight Through Actions - Based on the scheduled date (up to 10 days)
- Manage Forms Action
 - Launch Forms - 10 days
 - Account Open Forms - 30 days

In-Person

- Straight Through Actions - launches immediately
- Manage Forms
 - Launch Forms - Browser Session - time triggers once the eSignature session is launched
 - Account Open Forms - Browser Session - time triggers once the eSignature session is launched

Documents Saved for Your View: Once your client(s) electronically signs the document, the activity status in the Advisor Desktop is updated and the action can proceed. The signed document and a DocuSign Certificate of Completion will be attached to the activity as well.

Email Notifications: You have the ability to receive an email notification letting you know when your client either signs or cancels a document that you sent to them for electronic signature. From within the Preferences icon, check the Documents requiring electronic signature have been signed or cancelled box.

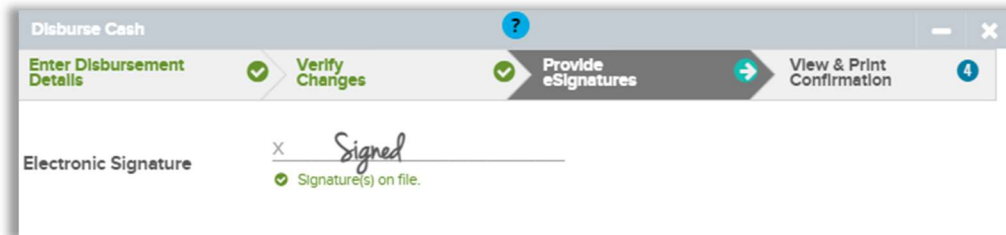
Account Opening: When a firm user submits an Account Open Form through the Manage Forms action, it will need to route to the Financial Advisor listed as the primary advisor on the account for electronic signature prior to being sent to the client for electronic signature. The Financial Advisor will receive an email, which will require an Access Code to be entered. The Access Code is the Financial Advisor's SEI Wealth Platform user ID. *Example: If the Financial Advisor's user ID is jdoe12345, then the Access Code will be jdoe12345.* Additionally, when using the in-person electronic signature process, you do not need to complete the electronic signature portion immediately upon submission. Locate your new "Submitted Paperwork" (Account Opening) activity within the Activity Dashboard and expand the drawer icon to return to the in-person electronic signature process and resume where you left off. Select Launch eSignature to re-launch the signing ceremony in DocuSign.

Please note that the ability to utilize electronic signatures through DocuSign is based on your role and entitlements, as well as any applicable Broker Dealer rules and approval.

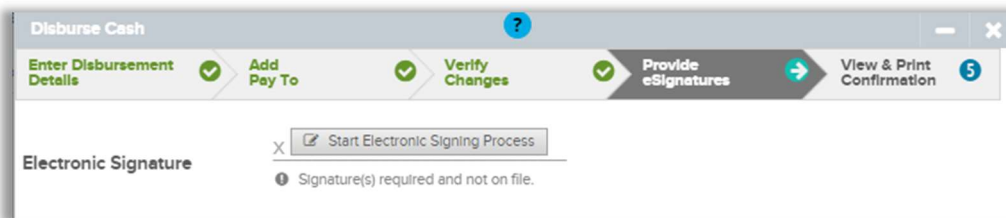
Initiating the Electronic Signature Process

For certain Actions, an Electronic Signature will be required if the Pay To selected has not been setup for, or is not eligible for, Straight Through Processing. You can confirm if the payee is Straight Through Eligible (the investor's signature is not required) by reviewing the Related Parties page within the Profile menu of the account. Within the details column below the Pay To parties' information, you will see "Straight Through Eligible" if no signature is required.

When a Signature is required and the Pay To is set up as "Straight Through Eligible" you will see **Signed** displayed as Signature(s) on file.



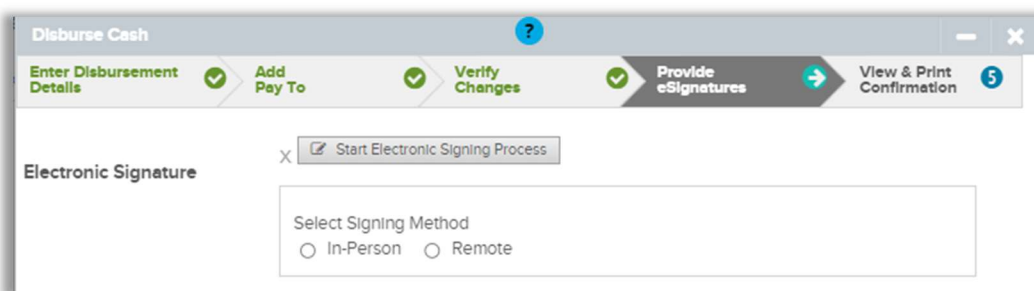
When a Signature is required, you can start the electronic signature process by selecting the **Start Electronic Signing Process** button.



There are two options available for sending the electronic signature.

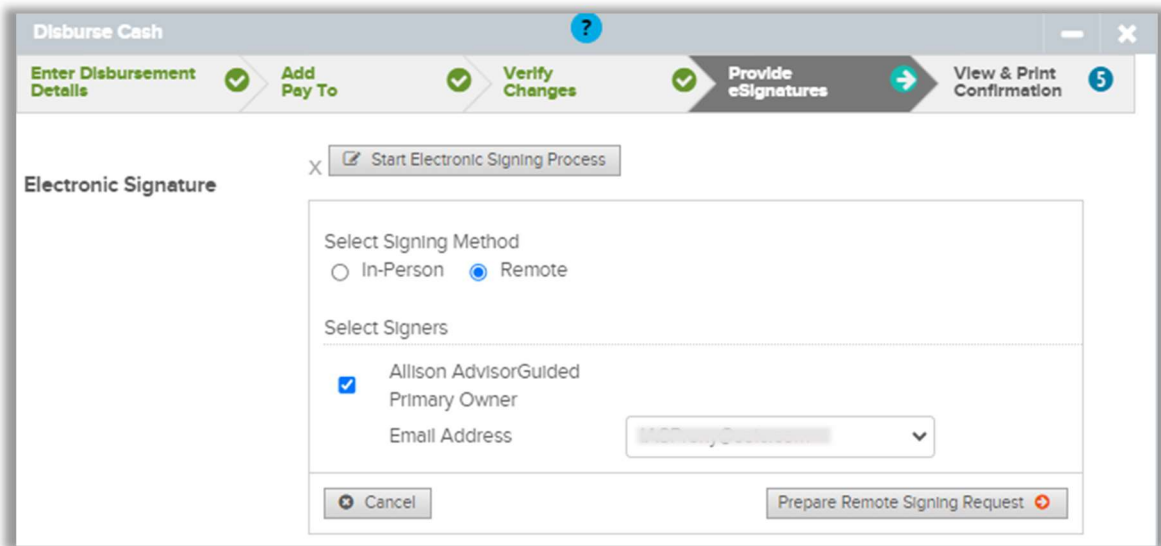
In-Person: The signer is present in your office and when the time comes, they will take control of your keyboard and mouse to authenticate and complete the electronic signature process outlined in the In-Person section.

Remote: The signer is not present and an email will be sent to the client. They will follow the electronic process outlined in the Remote section.



Remote Workflow

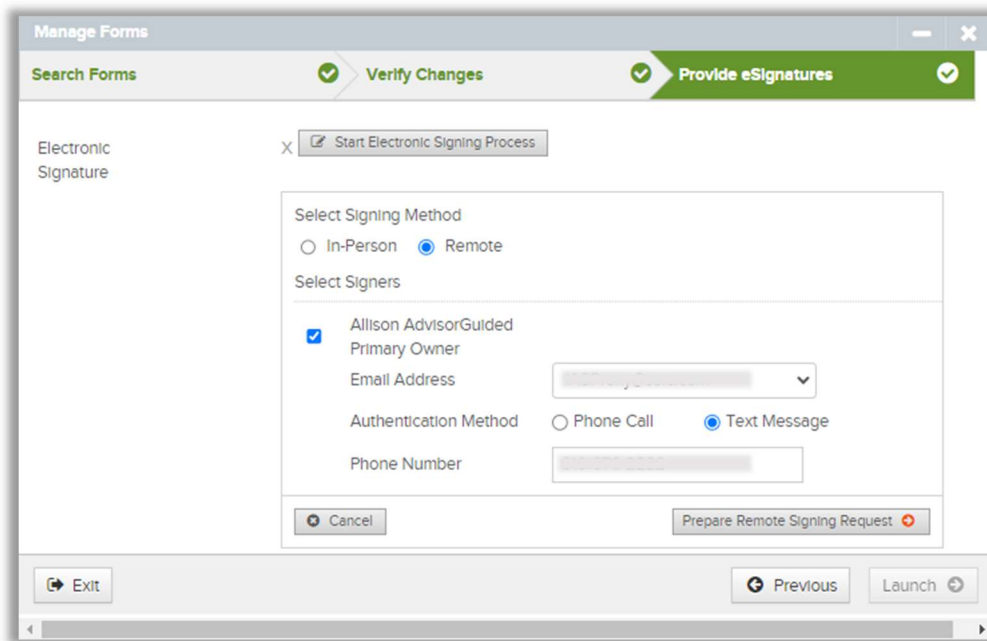
When the action follows the Knowledge Based question authentication process, only an email is required for the **Remote** option. If SEI Advisor Center has a known email address for an authorized signer, it will display. New email addresses can be added through the Modify Contact Information action prior.



When the action follows the Pin Authentication Method, an email and phone number is required for the Remote option. There are also two options for the authentication pin: Phone Call and Text Message.

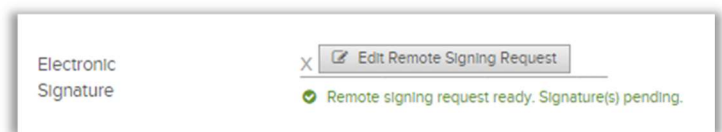
Phone Call: Provide the phone number (landline or mobile) that will receive a phone call, during which your client will provide the authentication pin provided from within the DocuSign website.

Text Message: Provide the mobile number that will receive an authentication pin through Text Message, which your client will then enter into the DocuSign website.



After completing the information, select the **Prepare Remote Signing Request** button.

A green checkmark will confirm the information has been filled in successfully.



Please note: The next step is to submit the action or file in the form. The electronic signature request is not sent to your client until the submit/send or Send to SEI button is selected.

An Activity is created confirming that the document is now awaiting an electronic signature.

When submitting an online action, the View & Print Confirmation page will display the submission message and the Activity ID.

When Launching a Form through the Manage Forms action, you will need to select **Send to SEI** to send the document to your client for electronic signature. A message will then display with the activity ID.

Vendor: SEI (WEALTH PLATFORM ONLY)
Title: Beneficiary Designation Form - IRA - SWP

[Print Preview](#) [Send to SEI](#) [Reload](#) **INDIVIDUAL** ▾



Confirmation

Form(s) have been submitted but will not be fully processed until signed and/or approved if necessary. Your activity ID is 9908766.

[OK](#)

The activity will display a status of **Waiting For Esignature** until your client electronically signs the document and selects Finish within the DocuSign website.

Recent Activities ▾


	Cash Disbursement Schedule Jane Smith IRA #ELM000000261	Waiting For Esignature Due: 15-Nov-2017
	Submitted Form Jane Smith IRA #ELM000000261	Waiting For Esignature Due: 16-Nov-2017

Your Client's Remote DocuSign Process

Your client will receive an email from DocuSign stating that an SEI Document is ready for review. The email will include the client's name, the document name, and a **REVIEW DOCUMENT** button, which will start the electronic signature process.

DocuSign Demo System <dse_demo@docusign.net>
SEI Documents For Your Review

DocuSign



You've received a new document to review and sign.

[REVIEW DOCUMENT](#)

Jane Smith,
Please DocuSign IRA.pdf
Thank You

For Knowledge Based Questions, your client will need to fill in Personal Information in order to generate the list of questions to verify their identity. It is recommended, but not required, to also provide the **Last 4 digits of the SSN** and the **Date of Birth**. By entering this additional information, the questions generated will be more specific to the client.

Security Requests from Sender

ID Check - Personal Information

Enter your home address. This information, along with your name will be used to generate a list of questions to verify your identity.

Required Information (Home Address)

Name: Jane Smith

Street 1: 1 Demo Dr

Street 2:

City: Oaks

State: PA

Zip: 19456

Optional Information

Last 4 digits of SSN: 1234

Date of Birth: 01 / 01 / 1900

mm / dd / yyyy

[NEXT](#) [CANCEL](#)

There will be six questions generated as a means of an identity check requested by the document sender. None of this information is provided to the document sender or to anyone except the client.

Please note: Your client will be presented with six questions. To pass authentication, they must answer at least four questions correctly. If four or more are answered incorrectly, they will fail authentication. If only three questions are answered correctly, the user will be presented with three additional questions. They must answer at least two correctly to proceed. In the case of a failed authentication, the document will not be accessible and a message will be sent to activity within the Advisor Desktop, stating there was a failure.

Security Requests from Sender

ID Check - Identification Questions

These questions are being generated as a means of an identity check requested by the document sender. None of this information is provided to the document sender or to anyone except you.

Which of the following street addresses in Russellville have you ever lived at or been associated with?

1915 East 13th Street 2116 South Verona Avenue
 200 Hollow Lane 310 East Gum Street
 21 Sunfish Court None of the above or I am not familiar with this property

Which of the following people have you know?

Al Stutler Walter Schneider
 Charles Bole William Scherer
 Lamar Oden I do not know ANY of the people listed

Which of the following corporations have you ever been associated with?

Bvrg Properties Rhodestech Incorporated
 Forest Park Zoological Society White House Stores Inc The
 Manoptan Technology Solutions None of the above

In which of the following counties have you ever lived or owned property?

Faulkner, Arkansas Rutland, Vermont
 Henry, Illinois Windsor, Vermont
 Randolph, Illinois I have never lived in any of these counties

Which of the following corporations have you ever been associated with?

1034 West Cascade Condominium Association Montage Square
 Bell County Industrial Foundation Southern Star Wood Display Cases
 Manor Incorporated None of the above

Which of the following people have you know?

Bernard Singer Jeffrey Wichter
 Gerald Habel Leonard Kang
 Hattie Linder I do not know ANY of the people listed

Please answer all of the questions provided.

SUBMIT ANSWERS ←

Signing your Documents

You did not answer the ID Verification questions correctly, so you cannot access these documents.

For more information or help in gaining access to this document please contact the sender:

swpdocusignps15
SEI Investments
swpdocusignps15@seic.com

We've also sent a message to the sender to notify them of this status.

EXIT

For Pin Authentication, your client will need to either receive a phone call or text message to the phone number provided.

Phone Authentication: The phone number that was initially provided will be displayed and by selecting the **CALL** button, your client will receive an automated phone call.

Phone Authentication

The sender has selected phone authentication.

1. Choose a phone number where you can receive a phone call, and select the "Call" button below.
2. You will receive a phone call, and will be prompted to provide a code and speak your name.

Authenticating Signer Name: **Jane Smith**

Please select a phone that you currently can answer to authenticate:

+1 5555551212

CANCEL **CALL**

If you are not near a phone to authenticate you, select "Cancel", and return when you are near one of the above phones.

Your client will enter or speak the Authentication Code provided on the DocuSign website into their phone and then provide their name. Once your client successfully provides the authentication code and name, the screen will automatically open up the document.

Security Requests from Sender

Phone Authentication

Call Placed. Your phone should ring within 10 seconds.

When your phone rings, you must enter the following Authentication Code into your phone.

Authentication Code: 787466

Once you enter the code in response to the telephone prompt, and provide a voice sample, you will be authenticated.

CANCEL **PHONE AUTHENTICATION COMPLETE**

If your phone does not ring within a minute, select "Back" and ensure you have entered the correct phone information.

Text Authentication: The phone number that was initially provided will be displayed and by selecting the **SEND SMS** button, your client will receive a text message.

SMS Authentication
In order to access this document, you need to confirm your identity using your mobile phone.

1. Choose a phone number below and select the "Send SMS" button to receive a text message.
2. Enter the access code on the following page.

Authenticating Signer Name: **Jane Smith**

Please select a phone that can receive text messages so you can authenticate:

+1 5555551212

SEND SMS **CANCEL**

If you do not have access to your mobile phone at this time, select "Cancel" and retry when you have access.

They will enter the authentication code into the SMS Authentication field and then select the **CONFIRM CODE** button.

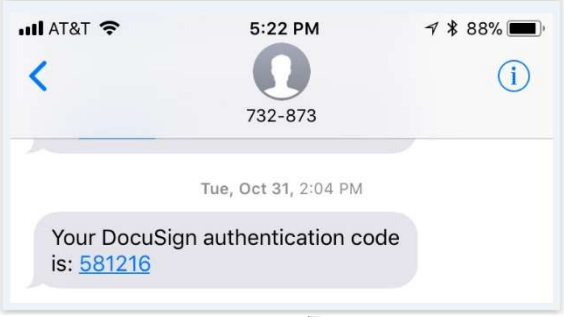
Security Requests from Sender

SMS Authentication
An SMS message has been sent to your mobile phone. You should receive it momentarily.

Enter the code you received in the SMS message in the field below and press Confirm Code.

 CONFIRM CODE **CANCEL**

If you do not receive an SMS message, select "Cancel", verify the mobile phone number and try sending the SMS message again.



Once the authentication process is complete, your client will have access to the document. First, they will agree to use electric records and signatures and then select **CONTINUE**.

Please Review & Act on These Documents DocuSign

Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

CONTINUE **OTHER ACTIONS** ▾

By selecting **START**, your client will be guided to the signature line.

Selecting **Sign** will open up the Adopt Your Signature page.

Select the **ADOPT AND SIGN** button to confirm the electronic signature.

The electronic signature will populate on the signature line and your client will select **FINISH** to complete the process.

Your Client can sign up for a free DocuSign account, which will provide access to all of the documents that they have signed.

Save a Copy of Your Document

Sign up for a FREE DocuSign account today and sign all your documents electronically.

Email
jbsontz@seic.com

Password

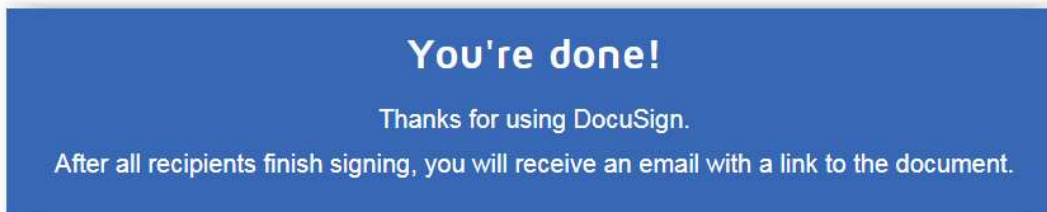
Confirm Password

By selecting SIGN UP, you agree to the [Terms & Conditions](#) and [Privacy Policy](#)

SIGN UP NO THANKS

- Electronically sign any document.
- Get signatures from others.
- Sign on the go with DocuSign Mobile!

This will complete the remote electronic signature process and the document will be sent back to SEI for processing. The document will also be saved within the Activity and under the Documents section of the Household/Client/Account pages.



In-Person Workflow

When the action follows the Knowledge Based question authentication process, no additional information is required for the In-Person option.

Electronic Signature

Edit In-Person Signing Request

Select Signing Method

In-Person Remote

Select Signers & Signing Order

Jane Smith
Primary Owner

Cancel Prepare In-Person Signing Request

When the action follows the Pin Authentication Method, a phone number is required for the In-Person option. There are also two options for the authentication pin: Phone Call and Text Message.

Phone Call: Provide the phone number (landline or mobile) that will receive a phone call, during which your client will provide the authentication pin provided from within the DocuSign website.

Text Message: Provide the mobile number that will receive an authentication pin through Text Message, which your client will then enter into the DocuSign website.

After completing the information, select the **Prepare In-Person Signing Request** button.

A green checkmark will confirm the information has been filled-in successfully.

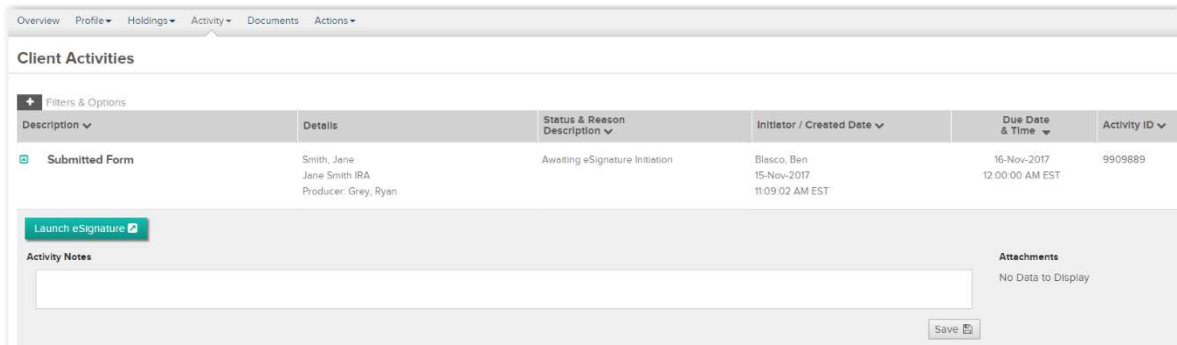
Please note: The next step is to submit the action or file in the form. The electronic signature request is not available for your client until the submit/send or Send to SEI button is selected.

An Activity is created confirming that the document is now awaiting an electronic signature.

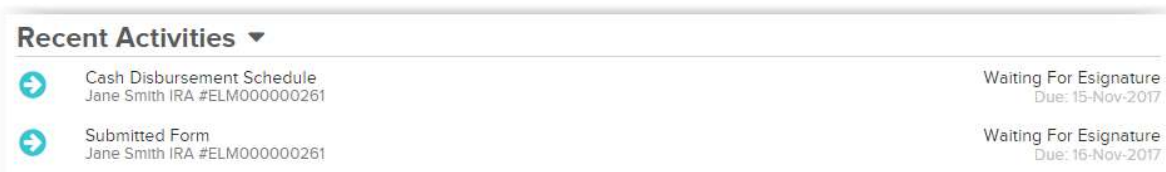
When submitting an online action, the View & Print Confirmation page will display the submission message and the Activity ID. A new tab will automatically open to start the In-Person electronic signature process.

When Launching a Form through the Manage Forms action, you will need to select **Send to SEI** to start the In-Person electronic signature process. A message will display the Activity ID and provide a link to continue.

Selecting the **Click here** link will open a new tab and start the In-Person electronic signature process. By choosing **Ok** and not the **Click here** link, the In-Person electronic signature is not started. You will need to navigate to the Activity within the Activity page and expand the arrow. A **Launch eSignature** button will display, which can be selected to open a new tab and start the In-Person electronic signature process. This process is available for all Forms, including Account Open, that are launched from within the Manage Forms action.



The activity will display a status of **Waiting For Esignature** until your client electronically signs the document and selects Finish within the DocuSign website.



After submitting an online action a new tab will open and provide instructions on passing the control to your client. After submitting a Launched Form through the Manage Forms action, the **Click here** link will be available to start the In-Person electronic signing process.

swpdocusignimps15 assigned you as the host for an in-person signing session for Jane Smith. As a host, you will:

- 1 Pass control of the signing session to the hosted signer.
- 2 Ask the signer to enter any required authentication information.
- 3 Help the signer sign and get a copy of the finished document.
- 4 Take control of the signing session.
- 5 Log in to your DocuSign account to complete the signing session.

Check here to skip this message in the future

START CANCEL

You will be instructed to pass the control to your client.

SEI Investments, pass control of the session to Jane Smith.

CONTINUE CANCEL

Your Client's In-Person DocuSign Process

After your client takes control, they will start the electronic signature process.

For Knowledge Based Questions, your client will need to fill in Personal Information in order to generate the list of questions to verify their identity. It is recommended, but not required to also provide the **Last 4 digits of the SSN** and the **Date of Birth**. By entering this additional information, the questions generated will be more specific to the client.

Security Requests from Sender

ID Check - Personal Information

Enter your home address. This information, along with your name will be used to generate a list of questions to verify your identity.

Required Information (Home Address)	Optional Information
Name: Jane Smith	
Street 1: <input type="text" value="1 Demo Dr"/>	Last 4 digits of SSN: <input type="text" value="1234"/>
Street 2: <input type="text"/>	Date of Birth: <input type="text" value="01"/> / <input type="text" value="01"/> / <input type="text" value="1900"/>
City: <input type="text" value="Oaks"/>	<small>mm / dd / yyyy</small>
Slate: <input type="text" value="PA"/>	
Zip: <input type="text" value="19456"/>	

NEXT CANCEL

There will be six questions generated as a means of an identity check requested by the document sender. None of this information is provided to the document sender or to anyone except the client.

Please note: Your client will be presented with six questions. To pass authentication, they must answer at least four questions correctly. If four or more are answered incorrectly, they will fail authentication. If only three questions are answered correctly, the user will be presented with three additional questions. They must answer at least two correctly to proceed. In the case of a failed authentication, the document will not be accessible and a message will be sent to activity within the Advisor Desktop, stating there was a failure.

Security Requests from Sender

ID Check - Identification Questions

These questions are being generated as a means of an identity check requested by the document sender. None of this information is provided to the document sender or to anyone except you.

Which of the following street addresses in Russellville have you ever lived at or been associated with?
 1815 East 13th Street 2116 South Verona Avenue
 200 Hollow Lane 310 East Gum Street

Which of the following people have you known?
 Al Sautner Walter Schindler
 Charles Bole William Scherrer
 Lamar Oden I do not know ANY of the people listed

Which of the following corporations have you ever been associated with?
 Bvlg Properties Rhodestech Incorporated
 Forest Park Zoological Society White House Stores Inc The
 Metropolitan Technology Solutions None of the above

In which of the following counties have you ever lived or owned property?
 Faulkner, Arkansas Rutland, Vermont
 Henry, Illinois Windsor, Vermont
 Randolph, Illinois I have never lived in any of these counties

Which of the following corporations have you ever been associated with?
 1034 West Oakdale Condominium Association Mortgage Square
 Bell County Industrial Foundation Southern Star Wood Display Cases
 Manor Incorporated None of the above

Which of the following people have you known?
 Bernard Singer Jeffrey Wicht
 Gerald Hebel Leonard Kang
 Hattie Linder I do not know ANY of the people listed

Please answer all of the questions provided.

SUBMIT ANSWERS

Signing your Documents

You did not answer the ID Verification questions correctly, so you cannot access these documents. For more information or help in gaining access to this document please contact the sender:
swpdocsignmpsi15
SEI Investments
swpdocsignmpsi15@sei.com

We've also sent a message to the sender to notify them of this status.

EXIT

For Pin Authentication, your client will need to either receive a phone call or text message to the phone number provided.

Phone Authentication: The phone number that was initially provided will be displayed and by selecting the **CALL** button, your client will receive an automated phone call.

Phone Authentication

The sender has selected phone authentication.

1. Choose a phone number where you can receive a phone call, and select the "Call" button below.
2. You will receive a phone call, and will be prompted to provide a code and speak your name.

Authenticating Signer Name: **Jane Smith**

Please select a phone that you currently can answer to authenticate:

+1 5555551212

CANCEL **CALL**

If you are not near a phone to authenticate you, select "Cancel", and return when you are near one of the above phones.

Your client will enter or speak the Authentication Code provided on the DocuSign website into their phone and then provide their name. Once your client successfully provides the authentication code and name, the screen will automatically open up the document.

Security Requests from Sender

Phone Authentication
Call Placed. Your phone should ring within 10 seconds.

When your phone rings, you must enter the following Authentication Code into your phone.

Authentication Code: 787466

Once you enter the code in response to the telephone prompt, and provide a voice sample, you will be authenticated.

CANCEL **PHONE AUTHENTICATION COMPLETE**

If your phone does not ring within a minute, select "Back" and ensure you have entered the correct phone information.

Text Authentication: The phone number that was initially provided will be displayed and by selecting the **SEND SMS** button, your client will receive a text message.

SMS Authentication
In order to access this document, you need to confirm your identity using your mobile phone.

1. Choose a phone number below and select the "Send SMS" button to receive a text message.
2. Enter the access code on the following page.

Authenticating Signer Name: **Jane Smith**

Please select a phone that can receive text messages so you can authenticate:

+1 5555551212

SEND SMS **CANCEL**

If you do not have access to your mobile phone at this time, select "Cancel" and retry when you have access.

They will enter the authentication code into the SMS Authentication field and then select the **CONFIRM CODE** button.

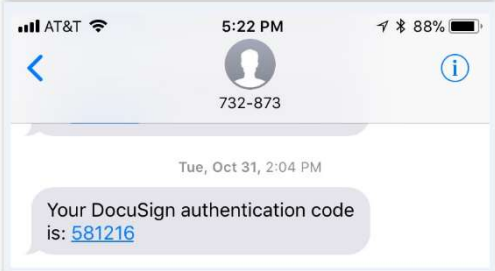
Security Requests from Sender

SMS Authentication
An SMS message has been sent to your mobile phone. You should receive it momentarily.

Enter the code you received in the SMS message in the field below and press Confirm Code.

CONFIRM CODE **CANCEL**

If you do not receive an SMS message, select "Cancel", verify the mobile phone number and try sending the SMS message again.



The screenshot shows an iPhone text message interface. At the top, it says "AT&T" and "5:22 PM" with a battery icon at 88%. Below that is a contact name "732-873". The message content says "Tue, Oct 31, 2:04 PM" and "Your DocuSign authentication code is: 581216".

Once the authentication process is complete, your client will have access to the document. First, they will agree to use electronic records and signatures and then select **CONTINUE**.

Please Review & Act on These Documents DocuSign

Please read the Electronic Record and Signature Disclosure.
 I agree to use electronic records and signatures.

CONTINUE **OTHER ACTIONS**

By selecting **START**, your client will be guided to the signature line.

START

DocuSign Envelope ID: 51F52491-90D4-4AF5-9925-41B4BFCA3ABC

SEI Private Trust Company
IRA Beneficiary Designation Form

SEI Account Number:
ELM000000261

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docuSign.com

Selecting **Sign** will open up the Adopt Your Signature page.

The screenshot shows a form titled "Beneficiary Designation Form" with a "SIGN" button highlighted in yellow. The form includes fields for "Name of Spouse", "Spouse's State of Residence", "Signature of Spouse", and "Date". On the right side, there is a section for "Jane Smith" with a "Sign" button highlighted in yellow. Below this, there are fields for "Name of IRA Owner" and "Signature of IRA Owner".

Select the **ADOPT AND SIGN** button to confirm the electronic signature.

The screenshot shows a dialog box titled "Adopt Your Signature". It prompts the user to "Confirm your name, initials, and signature." There are input fields for "Full Name*" (Jane Smith) and "Initials*" (JS). Below these are options to "Select Style" or "Draw". A "PREVIEW" section shows a DocuSign signature of Jane Smith and the initials JS. At the bottom, there are "ADOPT AND SIGN" and "CANCEL" buttons.

The electronic signature will populate on the signature line and your client will select **FINISH** to complete the process. Your Client can sign up for a free DocuSign account, which will provide access to all of the documents that they have signed.

The screenshot shows a document preview page. The signature line is populated with the electronic signature of Jane Smith. At the bottom of the page, there is a yellow "FINISH" button. The page also displays "DocuSign" branding and a "4 of 4" page indicator.

The screenshot shows a dialog box titled "Save a Copy of Your Document". It prompts the user to "Sign up for a FREE DocuSign account today and sign all your documents electronically." There are input fields for "Email" (jshontz@seic.com), "Password", and "Confirm Password". On the right side, there are three icons with text: "Electronically sign any document.", "Get signatures from others.", and "Sign on the go with DocuSign Mobile!". At the bottom, there are "SIGN UP" and "NO THANKS" buttons.

This will complete the In-Person electronic signature process and the document will be sent to SEI for processing. The document will also be saved within the Activity and under the Documents section of the Household/Client/Account pages.

You're done!
Thanks for using DocuSign.
After all recipients finish signing, you will receive an email with a link to the document.

Frequently Asked Questions

What happens if the client declines the document or fails authentication?

Once the client successfully authenticates and can view the document, they may choose not to sign the document. If the client declines the document, a message will be sent back to the Advisor Center activity with a status of Esignature Failure Pending Cancellation. You will not be able to relaunch this action and you will need to resubmit the entire action.

What if there are multiple clients that need to sign the document?

The process is the same as described in the Remote and In-Person sections, except that you would have checked off multiple clients that need to electronically sign the document. The order list is the order that the clients will receive the document. If there are two clients that need to electronically sign the document, the second client will not receive the document until the first client completes their electronic signature process first.

Can I see the document in the Activity once it is submitted?

The document will be saved as an attachment within the activity once the client completes the electronic signature process. The document will then also be saved within the Documents section of the Household/Client/Account pages.

How is a document produced if I submitted an online action for electronic signature?

When submitting an online action, such as Disburse Cash, for electronic signature, the Advisor Desktop converts the information and creates an applicable form for your client to review and sign. Once this generic document is electronically signed, it will be attached to the activity of the submitted action.

Where can I find the status of an action that I sent for electronic signature?

The status of the action can be found on the Activity page under the Status & Reason Description column or from within the generated activity next to the Status line.

Who can I call if I have additional questions?

If you have any additional questions regarding Electronic Signatures through DocuSign, you can always search for additional information from within the Help Menu; however, if you are still not finding the answers you are looking for, you can always call the SEI Wealth Platform Service Team at 800-734-1003.